

# The Ultimate Buyer's Guide to License Verification Solutions for Healthcare HR

Insights Into Industry Trends,  
Evaluation Criteria, and  
Leadership Buy-In



# Introduction

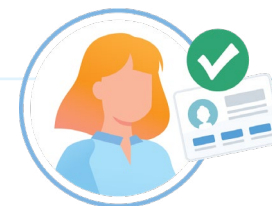
This guide is for healthcare human resource professionals or any other decision makers within the organization who are evaluating solutions to streamline and centralize the process of primary source verification and ongoing monitoring.

The stakes are high for enterprise healthcare organizations as they lean into an HR shared services model. Get it right, and you create long-lasting reductions in operating costs, streamlined processes, and a modern, seamless experience for applicants and employees. Get it wrong, and best case scenario you're back to square one. Worst case? You've adopted a solution that isn't ideal for your unique situation.

Primary source verification is one of the regulatory requirements enterprise healthcare is taking a hard look at right now. With thousands or even tens of thousands of licensed employees spread across states, some with multiple credentials to verify, the decentralized model is proving to be not only cumbersome, but also a potential liability. Defining and enforcing standards across facilities can be difficult, it requires administrative resources at each facility, and accessing the data in a centralized location is nearly impossible. Decentralized primary source verification is not an enterprise solution.

This, you likely already know. Defining the challenges is the easy part. Rather, it's defining the solution that proves to be more difficult. Although primary source verification is a small niche, there are plenty of service providers who claim to simplify and streamline the process. Still, the process of selecting the right solution for your organization requires thought, planning, and flawless execution.

In this guide, we'll help you to recognize the key questions to ask of your potential solution providers, as well as features that a full-lifecycle, enterprise solution should offer at an out-of-the-box capacity.



*In a sample of approximately 500,000 licenses and certifications within the EverCheck system, **25% renewed within a 6 month time-frame.***

*This would have resulted in 10,000+ hours of manual primary source verification (based on an average of 5 minutes per verification) had the process not been automated.*

# Key Functions for Evaluating License Verification Providers

## 1 DEFINING KEY REQUIREMENTS FOR POSITIONS WITHIN THE ORGANIZATION

Every position within your organization has its own set of requirements caregivers must satisfy. Traditionally, human resources and recruiters would cross-reference an caregiver's qualifications with the requirements for his or her position.

A solution should provide a mechanism to automatically verify that the caregiver's credentials align with the requirements for his or her position. This includes handling complex and/or scenarios, those requiring multiple licenses and certs, and those where the credential may be obtained at a later date.

## 2 COLLECTING REQUIRED CREDENTIALS FROM APPLICANTS AND EMPLOYEES

Creating a seamless experience for caregiver's to submit their required credentials sets the stage for the type of experience they can expect from the health system when it comes to its other administrative processes.

A solution should allow caregiver's to digitally submit required credentials. This eliminates the need to make special trips to the HR department to hand-deliver the documentation.



### 3 VERIFICATION AND ONGOING MONITORING OF LICENSES AND CREDENTIALS

The Joint Commission requires verification of licenses and credentials at hire and at time of renewal. A verification solution should, at minimum, meet those requirements and ideally should exceed the requirements.

Daily verification ensures that when important changes in license status occur, the appropriate parties are made aware immediately. Upon sourcing data from the primary source, a solution should look for:

- Changes in license status
- License expiration dates
- Disciplinary actions
- Name discrepancies

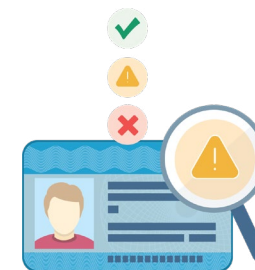
In addition to licenses, a solution should be able to verify other credentials such as national certifications, non-primary source verifiable credentials, and DEA registrations. The more comprehensive the verification profile, the fewer ancillary services and integrations necessary.

Be sure to ask what can be automated versus what must be verified manually.

### 4 STORAGE AND RETRIEVAL OF PRIMARY SOURCE DATA

In the event of a regulatory survey, your hospital/facility may be required to provide proof of the primary source verification performed. For this reason, a solution should enable digital records storage where a copy of the primary source verification is easily retrieved at any time.

Be sure to ask how often the solution provider captures a screenshot of the primary source verification and how they account for the date the license was verified.



*In the same sample of 500,000 licenses and certifications monitored over a 6-month period, **2,192 disciplinary actions were captured** that may have otherwise gone undetected if not for daily verification.*

## 5 INFORMATICS AND REPORTING

Depending on how often a solution provider verifies licensure, you may have a considerable amount of primary source data available to you. A solution should convert this data into actionable insights for your organization.

### Reports should help you answer questions like:

- At a glance, how many caregivers are currently clear to work based on their licensure status and how many have upcoming license renewal deadlines?
- How many employees currently have elapsed licensure?
- What is our upcoming renewal volume? How many employees will be renewing within the coming months?
- Whose name isn't matching the name on record with the primary source, and why?

These reports should provide a window into the licensure health and compliance of your organization as well as allow you to drill down and investigate further.



## 6 ENABLING COMMUNICATION BETWEEN HR, SUPERVISORS, AND STAFF

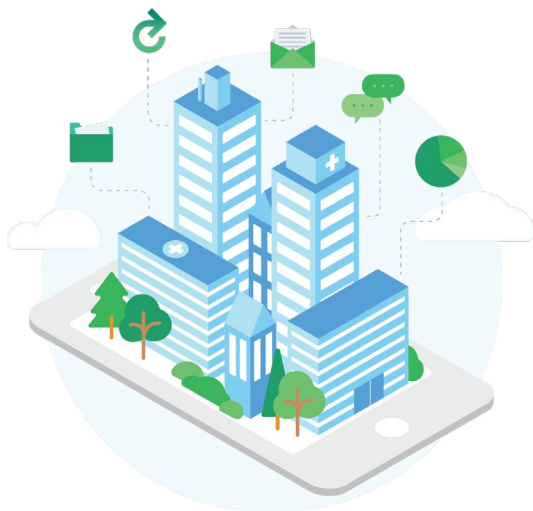
A verification solution shouldn't require its own tab to be open at all times. When important changes occur that require your attention, the solution should alert you that an issue requires your attention.

Additionally, the solution should enable automated communication efforts to remind licensees and their supervisors of upcoming renewal deadlines. Ideally, this would help reduce the incident of late renewals.

## 7 INTEGRATIONS

Data redundancy is never a bad idea; conversely, effort redundancy is. A solution should be able to integrate with your system of record so that primary source data is replicated within the HR system and, in turn, the system stays as up to date as the primary source itself. This integration should eliminate the need for an HR representative to manually enter primary source data, like expiration dates, into the HR system.

HRIS integration is one option. Be sure to ask about other integrations, such as those with your scheduling system or your document management system. These can provide crucial data duplications that can help safeguard your organization against potential liabilities.



## 8 COMPLETE LIFECYCLE DESIGN

Seek out and end-to-end solution that allows you to define requirements, verify licensure, and provide reporting for both applicant and employee populations. By keeping a comprehensive verification record for caregivers in one system, you can have confidence that caregivers have remained clear to work from prior to their start date throughout their tenure with your organization.

# Evaluation Checklist

## DEFINING KEY REQUIREMENTS

- Ability to upload/import requirements for each job role and store within the system for reference against applicant and employees licensure
- Ability to handle complex scenarios, such as and/or requirements or those where the license/certification may be obtained at a later date.
- Automated compliance calculations that all required licensure is in active and good standing.
- Alerts to designated staff when a caregiver is flagged for not meeting the requirements of his/her position.

## COLLECTING REQUIRED CREDENTIALS FROM CAREGIVERS

- Provide a platform for caregivers to electronically submit required licenses, certifications, and registrations (LCRs).
- Verify the LCR immediately upon submission or, in instances of photo-submission, allow for a manual review and attestation process.
- The caregiver credential upload platform is available in both web and mobile applications.

## STORAGE AND RETRIEVAL OF PRIMARY SOURCE DATA

- Solution acts as a central repository for primary source data for the entire organization.
- Capture a screenshot of the primary source verification as it appears via the primary source website.
- Provide a date-stamped screenshot to prove when the verification was captured.
- Proof of verifications are searchable, accessible, and available 24/7/365.
- Customer support is available to assist when necessary during a regulatory survey.

### VERIFICATION AND ONGOING MONITORING OF LICENSES AND CREDENTIALS

- Provide automated, electronic verification of LCRs wherever possible.
- Verify against primary sources daily, capturing any changes and relaying the information back to the employer.
- Provide manual verification services for LCRs where automation is not possible.
- Verify & relay the license status.
- Verify & relay the expiration date.
- Verify & relay any disciplinary actions.
- Verify & relay any name discrepancies between the employee record and the primary source.
- Verify & track DEA registrations.
- Verify & track non-primary source verifiable credentials.
- Store all verification data within the system for review by the employer.

### ENABLE COMMUNICATION BETWEEN HR, SUPERVISORS, AND STAFF

- Provide instant, automated email alerts to designated HR representatives and staff when a change in status, expiration date, or disciplinary sanction is captured during the verification process.
- Send automated renewal reminders to licensed employees at any frequency determined by the employer up to the license/certification expiration date.
- Send automated renewal reminders to supervisors regarding their licensed subordinates at any frequency determined by the employer up to the license/certification expiration date.
- Ability to combine users into notification groups based on similar notification and frequency needs.
- Ability for the employer to customize the automated messages delivered to supervisors and licensed employees.



### INFORMATICS AND REPORTING

- Provide a dashboard for system users with data relevant to them based on factors such as geographical region, department, etc.
- Provide a report that shows licenses by status as reported by the primary source.
- Provide a report that shows license expiration dates as reported by the primary source.
- Provide a report that shows any disciplinary actions detected during verification.
- Provide a report that calls out name discrepancies between the system of record and the primary source.
- Reports are interactive and workable, allowing for data drill-downs.
- Reports have export capabilities.
- Provide a mobile application with similar functionality as the reports provided in the desktop solution.

### INTEGRATIONS

- Provide a bi-directional integration with the HR system.
- Ability to integrate with a scheduling system.
- Ability to integrate and securely transfer primary source verification screenshots from the vendor solution to the document management system.
- Ability to manage license and credentials collection, verification, storage, and reporting across the entire system, including both applicant and employee data.

# Key Functions for Evaluating License Verification Providers

As with any enterprise software solution, it's an investment. The determining factors for healthcare leadership will be twofold:

*Will it help our organization meet or exceed the compliance standards set forth by the regulatory agency?*

*Will it save time and resources over the short and long term?*



Any solution exceeding the regulatory standards for primary source verification will undoubtedly satisfy the first concern. Next, calculate the return your organization can expect to receive on the investment to further solidify the decision to move forward with an automated solution.

The following worksheet enables you to do some basic calculations to identify your organization's potential return on investment. This worksheet is for illustrative purposes only and does not take opportunity costs into account. For many organizations, the responsibility of license verification falls with the HR team or direct supervisors. These professionals have expertise and talents that can have a direct and lasting impact on the organization's bottom line. If they're dedicating their time resources to manual license verification, it's taking away from more meaningful and productive initiatives.

**CALCULATE THE BASICS**

- a) \_\_\_\_\_ Number of licensed employees
- b) \_\_\_\_\_ Total number of licenses/certifications verified *(employees may hold more than one license or certification)*
- c) \_\_\_\_\_ Average hourly rate of administrative/HR staff verifying licenses

**DETERMINE HOW MUCH TIME YOUR ORGANIZATION SPENDS VERIFYING LICENSES**

- b) \_\_\_\_\_ # licenses verified x 5 minutes (average) per verification =
- d) \_\_\_\_\_ minutes per month\*
- d) \_\_\_\_\_ minutes per month / 60 = e) \_\_\_\_\_ hours per month

*\* Your organization should be verifying licenses, at minimum, once per month to avoid any unexpected changes in license status that could render an employee ineligible to practice.*

**DETERMINE YOUR ORGANIZATION'S COSTS FOR MANUAL LICENSE VERIFICATION**

- e) \_\_\_\_\_ hours per month x c) \_\_\_\_\_ hourly rate of staff =
- f) \_\_\_\_\_ cost per month x 12 = \_\_\_\_\_
- g) \_\_\_\_\_ cost per year

**COMPARE**

Compare the estimated yearly cost of manual license verification to the estimated yearly cost of switching to an automated verification solution.

g) \_\_\_\_\_ **VS** \_\_\_\_\_  
**MANUAL** **SOLUTION**

# Conclusion

As the healthcare space continues the trend of consolidation, implementing cost-saving, system-wide solutions will be a major focus for Human Resources.

Fortunately, primary source verification is a function that can be automated and streamlined with minimal effort and maximum benefit. Now, you're able to make an informed, educated decision and find the solution that's the best fit for your organization.

This resource is brought to you courtesy of EverCheck, a software company that specializes in making healthcare work better with smarter, integrated technologies. We've helped more than 350 healthcare clients across the nation adopt a more effective solution for license verification.

To learn more, visit [evercheck.com](https://evercheck.com).

